

HARRIS COUNTY RECORDS CENTER

STORAGE OF INACTIVE RECORDS

PREPARING RECORDS FOR STORAGE

Step 1: Obtaining Boxes and Forms

Boxes may be obtained through any vendor but the boxes must be a specific type: See box lists. The Records Center maintains a small amount of used boxes that its clients may use at no cost, when available.

Records Storage Forms are available on the Records Center Intranet site. The link to the form is:

[http://www.hctx.net/CmpDocuments/58/Forms/HCRC%20292-002%20\(Records%20Storage%20Form\).xls](http://www.hctx.net/CmpDocuments/58/Forms/HCRC%20292-002%20(Records%20Storage%20Form).xls)

Step 2: Identifying Records for Storage

The Records Center will accept only records of the following type:

- Inactive records
- Original copies
- Records with approved retention periods
- Records that have not met their retention requirements

Note: Screen records to ensure that only records that must be retained are sent to the Records Center for storage. Remove duplicate copies of documents and unused (blank) forms or stationary and publications.

Step 3: Boxing Records for Storage

Pack records in a manner that offers convenience of access, efficiency and safety. Use boxes for letter/legal size documents (approximately 15"x12"x10½" high). Containers designed for storage of other files (e.g. checks and microfiche) must be approved by the County Records Manager prior to use.

Pack boxes as though they are file drawers and in a logical order (e.g. numerical or alphabetical). All files shall face to the front of the box. Leave approximately 1½ inches in the container to allow for easy servicing. Do not include files with different retention periods in the same box. Boxes that are torn, overstuffed, bulging, labeled incorrectly or are not sealed with a seated lid will not be picked up.

Step 4: Labeling Boxes

Assign each box a unique, **consecutive** number. Refer to your previous storage form for the last box number used. Use the same numbering system consistently for each series. Coordinate with other records liaisons in your office to ensure that you are not using duplicate box numbers. Include the full box number on the Records Storage

Form including any alphanumeric prefixes (e.g., CR-101, HR-PAY-101, TSB-101, SO-PD4-234).

Label each box on the short side (front) in the following manner.

- a. Name of the Office of Record
- b. Name of the Section within the Office of Record (If applicable)
- c. Box Number (as determined in item 1 of this section)
- d. And, **Date** (i.e. 06-07-1986) last file was completed or closed out
- e. If needed, include a detailed list of contents or confidentiality statement in the box (e.g., HIPAA).

Step 5: Filling Out a Storage Form

Complete **Records Center Form 292-002, Records Center Storage Form**.

- a. Include the name of the Office of Record/Section on the "OFFICE" line.
- b. Type the number of each box in the "BOX NUMBER" column.
- c. Include a short description of contents in the "CONTENTS" column.
- d. Use the Records Control Schedule to determine what Records Series the box is in.
- e. Include the date the last file in the box was closed.

TRANSFERRING RECORDS TO THE RECORDS CENTER

Step 1: Submit Completed Storage Form

Fax or mail the completed records storage form to the Records Center to schedule an inspection of the records and subsequent pick up.

Email: Records.Center@itc.hctx.net

Step 2: Moving Boxes to Appropriate Location

Your boxes must be moved to an appropriate and easy accessible location for pickup by the Records Center Staff. Do not put boxes in storage rooms behind other items or furniture. Boxes should not be on shelves, in lofts, or any area that can not be safely reached. Any boxes scheduled for pick-up that are not readily accessible will not be picked up by the Records Center staff.

Step 3: Scheduling a Pickup of Boxes

Upon receipt, the Records Center staff will review the Records Storage Form. The review process includes verification of the record series titles, retention period, and duplicated box numbers. Once the review is completed, the Records Center staff will notify you with your box pick up date. All pick ups are subject to change due to inclement weather, personnel shortages and space availability. Turn-around time for pickups is typically three to four weeks from the date that we receive the Storage Form. This time could be longer depending on the current backlog. Please ensure that an employee from your office is available on your scheduled pick-up day.

Step 4: Final Copy of Storage Form

Once a Records Center Staff member has picked up your boxes, they will sign your box storage lists or provide you with a signed copy for your records. You will need this records storage list to retrieve or access your records.